

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

I Irene Hamby (Estate)

Atty Kruthers, Heather (for Public Administrator)

Atty Rackley, Doris Elaine (Pro Per)

Status Hearing

DOD: 10-7-06	DORIS ELAINE RACKLEY, Sister, was appointed Administrator with Full IAEA	NEEDS/PROBLEMS/COMMENTS:
	without bond and Letters issued on 8/28/07.	Need petition for final distribution.
Cont. from 111513, 022114, 061314, 092914, 033015, 092815, 012516	On 11/15/13, the Court removed Doris Rackley and appointed the PUBLIC ADMINISTRATOR.	Note: The petition for final distribution in the related estate has been filed and set for 6/27/16.
Aff.Sub.Wit.	Status report filed 9/25/15 states Irene's	
Verified	estate cannot be closed until Herbert's	
Inventory	closes. The hearing on Herbert's estate	
PTC	was continued to 11/16/15. The Public	
Not.Cred.	Administrator anticipates distribution of the property in kind from Herbert's estate	
Notice of	and the interest sold in Irene's estate.	
Hrg		
Aff.Mail	The PA respectfully requests the next	
Aff.Pub.	status hearing be set no sooner than four	
Sp.Ntc.	months from the date of this hearing to allow time for administration after	
Pers.Serv.	distribution from Herbert's estate.	
Conf.		
Screen	Status report filed 1/22/16 states the PA	
Letters	had hoped to have the account filed in Herbert Hamby's estate, but has further	
Duties/Supp	issues to resolve. The PA requests that the	
Objections	next status hearing be set no sooner	
Video Receipt	than four months from the date of this hearing.	
CI Report	Ü	
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 5/17/16
UCCJEA Citation		Updates: Recommendation:
FTB Notice		File 1 – Hamby
T I I I MONICE		THE T-HUITIDY

Atty Kruthers, Heather (for Public Administrator)

Atty Rackley, Elaine (Pro Per Administrator with Will Annexed)

Probate Status Hearing for Failure to File a First Account or Petition for Final Distribution

Distribution	
DOD: 9-6-05	NEEDS/PROBLEMS/COMMENTS:
	OFF CALENDAR
	First and Final Account filed
Cont. from	5/13/16 is set for hearing on
092013, 111513,	6/27/16
022114, 061314,	
092914, 033015, 060115, 072715,	
092115, 111615,	
012516	
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt CI Report	
9202	
Order	
Aff. Posting	Reviewed by: skc
Status Rpt	Reviewed on: 5/17/16
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 2 – Hamby

Adam Carbajal Special Needs Trust 4

Case No. 10CEPR00612

Attorney

Jennifer L. Walters; Lisa M. Horton (for Petitioner Maria Alvarez-Garcia, Trustee)

Fourth Account Current and Report of Trustee; Petition for Its Settlement; for Allowance of Attorneys Fees and Costs Advanced; and for Reimbursement of Costs Advanced by Trustee

			MARIA ALVAREZ-GARCIA, Trustee, is Petitioner.	NEEDS/PROBLEMS/
			Account period: 11/19/2014 - 12/15/2015	COMMENTS:
			Accounting - \$192,797.19	 Need original bank
			Beginning POH - \$177,818.06	account
Co	ont. from		Ending POH - \$186,766.68	statements as of
	Aff.Sub.Wit.		(\$154,943.10 is cash in blocked account)	the close of
				accounting period
✓	Verified		Trustee - waives	pursuant to
	Inventory		Two to a Town a reason (CO 270 F/	Probate Code §
	PTC		Trustee Expenses - \$2,370.56	2620(c), filed in a
	Not.Cred.		(see below; for van maintenance and repairs; receipts attached at Exhibit C;)	separate affidavit
			anached ar Exhibit C,)	in accordance with
✓	Notice of		Attorney - \$2,961.50	Probate Code §
	Hrg		(for services from 12/23/2014 to 3/31/2016; for .70 hours	2620(c)(7).
✓	Aff.Mail		@ \$245/hour totaling \$171.50; and 12.4 hours @	2. Need Order for
	Aff.Pub.		\$225/hour totaling \$2,790.00;)	Withdrawal of
-	Sp.Ntc.			Funds from Blocked
	; 		Attorney Costs - \$435.00	Account for the
-	Pers.Serv.		(filing fee)	payment of the
	Conf.			requested attorney
	Screen		Petitioner requests reimbursement of expenses for van	fees,
	Letters		maintenance and repair, and for additional funds from	reimbursement to
	Duties/Supp		the trust for further repair, based upon the following:	Petitioner, and van
	Objections		She is the Beneficiary's grandmother and receives The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that The financial halp or grait and a frame that	repairs, if
	Video		no financial help or assistance from the	approved.
	Receipt		Beneficiary's father or his mother; • She pays the majority of the Beneficiary's food,	
	CI Report		hygiene necessities, clothing, entertainment, school	
-		Χ	supplies, etc., from her own personal funds;	
		٨	Petitioner also paid for a majority of the regular	
√	Order		maintenance and repairs on the van, which is a	
	Aff. Posting		Trust asset (shown on Schedule E);	Reviewed by: LEG
	Status Rpt		Between 8/2013 and 11/2015, Petitioner paid a total	Reviewed on: 5/17/16
	UCCJEA		of \$2,370.56 in maintenance and repairs on the van	Updates:
	Citation		as shown in Exhibit C, and she requests	Recommendation:
	FTB Notice		reimbursement of that sum;	File 4- Carbajal
			Petitioner received an invoice of \$3,005.55 for	
			further van repairs needed, including new tires	
			(\$952.31) (copy attached as Exhibit D), and	
			requests a total of \$3,957.86 for the necessary	
			repairs and new tires on the van.	
			~Please see additional page~	
				4

4 First Additional Page, Adam Carbajal Special Needs Trust Case No. 10CEPR00612

Petitioner prays for an Order:

- 1. Approving, allowing and settling the Fourth Account and Report of the Trustee;
- 2. Approving all acts and transactions of the Trustee as set forth in the report;
- 3. Authorizing payment of the attorney fees and cost reimbursement;
- 4. Authorizing reimbursement to Petitioner for the **\$2,370.56** she paid for necessary repairs and maintenance for the Trust; and
- 5. Authorizing Petitioner to withdraw the sum of \$3,957.86 from the blocked account for the necessary repairs and new tires on the van.

Note: Court will set a status hearing in one of the following alternatives:

- Thursday, February 16, 2017 at 9:00 a.m. in Dept. 303 (1-year account) for filing of the 5th account;
 OR
- Thursday, February 22, 2018 at 9:00 a.m. in Dept. 303 (2-year account) for filing of the 5th account.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.

Atty

Ishii Family Trust 3/3/1992 Ca Fanucchi, Edward L. (for Gerald Ishii – Beneficiary – Petitioner) Burnside, Leigh W. (for Leslie Ishii – Co-Trustee – Respondent)

Probate Status Hearing **RE: Settlement**

		GERALD ISHII, Beneficiary and Co-Trustee, filed Petition of Beneficiary to Remove Successor Co-	NEEDS/PROBLEMS/ COMMENTS:
		Trustees, Appoint Temporary Successor Trustee,	
		and for Payment of Attorneys' Fees and Costs on	Minute Order 1/25/16:
Со	ont. from 012516	5/17/12. The petition was set for hearing on 7/2/12.	Counsel requests additional time.
	Aff.Sub.Wit.	LESLIE ISHII, Beneficiary and Co-Trustee, filed	
	Verified	Objection on 6/21/12.	
	Inventory	The hearing on 7/2/12 was continued numerous	
	PTC	times, and after numerous status and settlement	
	Not.Cred.	hearings, at the settlement conference hearing on	
	Notice of	1/5/15, the parties represented that they are	
	Hrg	working on agreement, and the Court set this status hearing re the agreement for 4/13/15.	
I	Aff.Mail	status fleating te the agreement for 4/15/15.	
	Aff.Pub.	The status hearing re the agreement was then	
	Sp.Ntc.	continued to 4/13/15, 7/13/15, and finally 10/19/15.	
	Pers.Serv.	On 10/19/15, the Court set an Order to Show	
	Conf. Screen	Cause hearing for 11/30/15 as to Gerald Ishii as to	
	Letters	why he should not be removed as co-trustee for failure to resolve the matter and to Edward L.	
-	Duties/Supp	Fanucchi as to why he should not be sanctioned	
	Objections	for his failure to appear.	
	Video	=	
	Receipt	Minute Order 11/30/15 states The agreement has been forwarded to Ms. Burnside, who needs	
	CI Report	additional time to review it. The orders to show	
	9202	cause are vacated.	
	Order		
	Aff. Posting	Status Declaration of Leigh W. Burnside filed	Reviewed by: skc
	Status Rpt	1/21/16 states she sent a revised draft agreement to Mr. Kelly for review on 12/1/15. She subsequently	Reviewed on: 5/17/16
	UCCJEA	learned of additional changes and sent a further	Updates:
	Citation	revised draft on 12/29/15. Mr. Kelly responded on	Recommendation:
	FTB Notice	1/13/16 that his client did not have substantive	File 5- Ishii
		changes but they were waiting on additional input	
		from the accountant. Likewise, Ms. Burnside is also waiting for additional information from her client's	
		accountant regarding a proposed easement that	
		the parties have apparently discussed. She	
		believes the remaining issues are not substantial	
		and the agreement is in close-to-final form.	

Attorney Respondent

Cunningham, Nikole E. (of McCormick Barstow, for Michelle K. Johnson – Daughter) Reynolds, Christine (formerly represented by Attorney Natalie R. Nuttall)

Status Re: Opening Probate for Distribution as Contemplated in the Settlement Agreement

	•	Teatre Balance	
	DD: 10/3/12	Estate History:	NEEDS/PROBLEMS/ COMMENTS:
-		MICHELLE K. JOHNSON, Daughter, filed a Petition for	COMMENTS.
		Letters of Administration on 1/22/13. The petition	Minute Order 4/25/16:
		estimated personal property valued at \$47,000 and	Counsel argues that
Co	ont. from 042516	real property valued at \$150,000 (total est. estate value	there is no need for
	Aff.Sub.Wit.	\$197,000).	probate as the §850
	Verified]	petition was filed and
	Inventory	Minute Order 2/21/13 (hearing on Petition for Letters of	settled. If the Court
	PTC	Administration) stated: Mr. Russo is appearing for	decides to dismiss the
	Not.Cred.	Christine Reynolds, a beneficiary. Mr. Russo informs the Court that he has just been retained and is in	matter before the status hearing, then
	Notice of	possession of Will and trust documents. Ms.	no appearance will
	Hrg	Cunningham contests the Will and Trust indicated by	be necessary on
	Aff.Mail	Mr. Russo. Mr. Russo informs the Court that he will be	5/23/16.
	Aff.Pub.	filing a petition. Parties agree that this matter will be	
	Sp.Ntc.	continued to the date agreed upon by all counsel	As of 5/17/16, the
	Pers.Serv.	once Mr. Russo's petition is filed.	following issue remains noted:
	Conf.	On 4/9/13, Ms. Johnson also filed a Petition for findings	remains notea:
	Screen	of Financial Elder Abuse, Conversion, and Recovery of	SEE ADDITIONAL
	Letters	Estate Property (Prob. Code §850).	PAGES
	Duties/Supp		
	Objections	CHRISTINE REYNOLDS, respondent and friend of	
	Video	decedent, filed an Objection to the Petition for finding	
	Receipt	of Elder Abuse, etc., on 7/2/13.	
	CI Report	On 7/8/13, the 850 petition was set for settlement	
	9202	conference.	
	Order		
	Aff. Posting	On 1/7/14, Ms. Reynolds filed an Ex Parte Petition for	Reviewed by: skc
	Status Rpt	Letters of Special Administration, which was granted on	Reviewed on: 5/17/16
	UCCJEA	1/7/14. Order authorized Ms. Reynolds to obtain	Updates:
	Citation	financial account statements. The order expired	Recommendation:
	FTB Notice	4 /7/14.	File 6- Smith
		Later, on 6/9/14, Ms. Johnson filed a Petition for Letters of Special Administration for the same purpose. At hearing on 7/16/14, the petition was granted for the limited purpose of securing information regarding accounts in the decedent's name. The order expired 10/16/14.	
L		<u>SEE ADDITIONAL PAGES</u>	

Page 2

At status hearing re special administration on 10/16/14, the matter was set for settlement conference and trial. Minute Order of 10/6/15 states that a written agreement is signed in open court and the Court ordered that the settlement and release signed today will constitute the settlement of all outstanding issues with regard to this estate. Ms. Cunningham to file a copy of the agreement. Trial vacated.

On 10/6/15, Notice of Settlement was filed. The Settlement and Release Agreement provides that the parties agree to sell the house and divide the proceeds. In addition, Ms. Johnson will receive all remaining proceeds from the sale of the decedent's insurance company, estimated at \$25,000, and all personal property and vehicle currently held in Ms. Reynolds' name. The parties agree that "Petitioner shall cause the Action to be dismissed with prejudice" within 10 days after close of escrow.

Note: On 2/26/16, Attorney Nuttall substituted out as Ms. Reynolds' attorney of record.

On 3/10/16, Ms. Johnson submitted a Request for Dismissal of the entire action. Dismissal was not entered because upon review of the settlement agreement, it appeared that the parties had agreed to sale and distribution of assets, but the estate had never been formally opened for authority to do so. Therefore, the Court set this status hearing and sent notice to Ms. Johnson's attorney.

On 4/12/16, a second Request for Dismissal of the Petition for Letters of Administration was filed. Again, dismissal was not entered because this status hearing was upcoming.

Status Report filed 4/18/16 by Attorney Ryan Marshall of McCormick Barstow states: Although a substitution of attorney has not been received by Petitioner's counsel, he is informed and believes that Respondent Christine Reynolds is currently in pro per. Petitioner's counsel is unaware of her address, so this report was served to Attorney Nuttall. This matter initially settled on 10/6/15 and the agreement was reduced to writing. The agreement addressed distribution of the vehicle, the remaining proceeds from the decedent's business, the procedure for preparing the residence occupied by Respondent to be sold, the division of the residence sale proceeds, and Petitioner taking possession of certain personal property from the residence. Pursuant to the settlement agreement, Petitioner took possession of the personal property, the vehicle, and the business sale proceeds. The residence was sold in January 2016. A further agreement was reached on or about 2/16/16 re allocation of sale proceeds. See attached. Petitioner and Respondent were issued checks from the office of Petitioner's counsel. As a result of the performance of the settlement agreement and subsequent agreement on proceeds allocation, there are no assets to be distributed, and any necessity to open a probate has been negated. Based on the foregoing, Petitioner requests the Court dismiss this matter in its entirety, with prejudice, without further appearance of counsel.

SEE ADDITIONAL PAGES

Page 3 – NEEDS/PROBLEMS/COMMENTS:

1. Need authority for distribution of assets pursuant to the settlement agreement including real and personal property with a total estimated estate value of approx. \$200,000 without administration under §8000, appointment of a personal representative, notice to creditors, notice to agencies including Dept. of Health Care Services and the CA Franchise Tax Board per §9202, inventory and appraisal, and final account or waiver thereof.

Although the parties reached a settlement for ultimate distribution, such distribution does not appear appropriate given the above-noted facts.

John Edward Breeden (Estate)

Case No. 14CEPR01118

Attorney Roberts, Gregory J. (for Shirley J. Shaeffer – Executor)

Probate Status Hearing Status RE: First or Final Account

	Trobate Grands freathing Grands Res Finst Grand	NEEDS/PROBLEMS/COMMENTS:
		, · · · · · · · · · · · · · · · · · · ·
		OFF CALENDAR.
		Order Settling First and Final
Cont. from		Account filed 01/28/2016
Aff.Sub.Wit.		710000111 11100 01/20/2010
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 05/17/2016
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 9- Breeden

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Attorney Jennifer L. Walters (for Robert Hudson and Mary Ann Hudson, Co-Administrators)

Probate Status Hearing Re: Filing of the Inventory and Appraisal

			Trobate states freating ke. Filling of the life	
DOD	: 9/7/2015		ROBERT HUDSON and MARY ANN HUDSON,	NEEDS/PROBLEMS/COMMENTS:
			parents, were appointed Co-Administrators	
			with Full IAEA authority without bond on	Need Final Inventory and
			1/25/2016.	Appraisal pursuant to
				Probate Code § 8800(b),
	t. from			or verified Status Report
A	Aff.Sub.Wit.		Letters issued on 1/28/2016.	and proof of service of
\	/erified			notice of the Status
I	nventory	Χ	Pursuant to Probate Code § 8800(b), Final	Hearing pursuant to Local Rule 7.5(B), including
P	PTC		Inventory and Appraisal was due 5/28/2016.	notice to GERALD
N	Not.Cred.		1111 6111 611 611 611 611 611 611 611 6	TOMASSIAN per the
l l	Notice of			Request for Special Notice
F	ŀlrg		Minute Order dated 1/25/2016 from the	filed 12/3/2015.
	Aff.Mail	Χ	hearing on the petition for letters of	
	Aff.Pub.		administration set the matter for a Status	
S	Sp.Ntc.	Χ	Hearing on 5/23/2016 for filing of the final inventory and appraisal.	
P	Pers.Serv.		птетногу ана арргават.	
	Conf.			
S	Screen			
L	.etters			
1	Outies/Supp			
	Objections			
\ 	/ideo			
R	Receipt			
	CI Report			
9	7202			
	Order			
	Aff. Posting			Reviewed by: LEG
S	Status Rpt	Χ		Reviewed on: 5/17/16
	JCCJEA			Updates:
	Citation			Recommendation:
<u> </u>	TB Notice			File 12- Hudson

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Attorney

John, Bazan F. (of Los Angeles, CA, for Petiitoners)

Petition to Determine Succession to Real Property

			ANTONIO GONZALES and ROSE	NE	EEDS/PROBLEMS/COMMENTS:
			PINEDA are Petitioners. (Relationship not stated)		ontinued from 4/25/16.
			noi sidied) 		onlinued from 4/25/16.
			40 days since DOD	1.	The petition is blank at #9a(3) and
Со	nt. from 04251	6	·		(4) re registered domestic partner.
	Aff.Sub.Wit.		No other proceedings		
~	Verified		18 A: \$49 408 00 (not varified by	2.	Need Attachment #11, which should provide the legal
~	Inventory	Χ	I&A: \$69,608.00 (not verified by Petitioners, not signed by attorney)		description of the real property, a
	PTC		(Assets consist of real property in		description of the personal
	Not.Cred.		Coalinga, CA, vehicles, accounts.)		property, and state the decedent's
~	Notice of	Х			interest in all assets.
.4	Hrg		Decedent died intestate	,	Need Attachment #13, which
-	Aff.Mail		Petitioners request ????	٥.	should state the specific property
	Aff.Pub.		(no Attachment #13)		interest claimed by each petitioner.
	Sp.Ntc.				
	Pers.Serv.			4.	Need Attachment #14, which
	Conf. Screen				should list all heirs (names, ages, relationships) pursuant to Probate
	Letters				Code §13152(a)(7). If deceased,
	Duties/Supp				need date of death pursuant to
	Objections				Local Rule 7.1.1.D.
	Video				
	Receipt			5.	The Inventory and Appraisal
	CI Report				attached to the petition is not verified by the petitioners or signed
	9202				by the attorney.
~	Order	Х			,
				6.	If there are other persons listed at Attachment #14, need notice to those entitled.
				7.	Need revised proposed order with attachments 9a and 9b. (Attaching only the I&A descriptions is not appropriate.)
	Aff. Posting			Re	eviewed by: skc
	Status Rpt				eviewed on: 5/17/16
	UCCJEA			_	odates:
	Citation			-	ecommendation:
	FTB Notice			File	e 17- Gonzales
					17

Case No. 14CEPR00474

Attorney

Cobb, Lee S.W. (for Conservator Rochelle Rosenbalm)

Status RE: Filing of an Amended Petition

	ROCHELLE ROSENBALM , Conservator with bond of \$774,480.48, filed her First	NEEDS/PROBLEMS/COMMENTS:
	and Final Account on 2/16/16.	
		OFF CALENDAR
Cont. from 050916	Examiner Notes indicated various	Amended petition filed 5/10/16 is set
Aff.Sub.Wit.	deficiencies.	for hearing on 6/22/16
Verified	At hearing on 3/28/16, the Court set this	
Inventory	status hearing for the filing of an	
PTC	amended petition.	
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		Paviawad by: ska
Aff. Posting Status Rpt		Reviewed by: skc Reviewed on: 5/17/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 28- Keehn